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**CLIENT WELCOME PACKAGE - WORKSHEET 1**

**FINANCIAL SNAPSHOT (pls complete and share back)**

1. Personal Information Sheet (2 minutes)
2. Current Income/Expense Snapshot (25 minutes)
3. Other Financial Commitments and Considerations (15 minutes)
4. Notes (4 minutes)

In this section, you will be answering a few “broad brush stroke” questions about your financial picture; anticipated future financial considerations; and offer some basic background information about yourself to help us start to build an informed foundation.

In Part II, you will be invited to delve more deeply into beliefs, attitudes, dreams, and roadblocks that may help or hinder your life style and financial goals.

The two parts, together, form a very unique and powerful basis for the integrated financial GPS system we will be creating together and on your behalf.

We will go into far more depth than these initial questions when we begin the actual financial planning documents. For now, these questions will give us a working snapshot informing us of key areas in which to next focus.

PERSONAL & CONFIDENTIAL

All information you share with us, remains personal, private, and confidential.

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**I-1 Personal Information Sheet** (2 minutes) Please provide all of the following personal information

**Full Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Work Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Home Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Cell Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Primary Email Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Date of Birth: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Marital Status (M/S/D/W) Spouse’s Name (if applicable): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Number Currently Living in Your Household: \_\_\_\_\_\_\_\_\_\_  
# of Children: \_\_\_\_\_ & Ages: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Your Trust Attorney Company Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Your CPA Company Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Where Do You Bank? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Your Brokerage Firm: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Date of Financial Plan: \_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date of Last Review: \_\_\_\_\_\_\_\_\_\_\_\_\_**

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**I-2 Current Expense/Income Snapshot** (E/I Worksheet 25 minutes)

Please list your current expenses and income here. This information will enable me to know where to delve more deeply as needed in our future work together. You only need rough in the basics here (being accurate as you can). We will fine tune and be much more specific in our future work together. This is just to help give us a broad picture to start with.

1) Annual Household Income: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
2) Total Average Monthly Expenses: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
3) Current “Net Worth”: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
4) Amount of Current Liquid Assets (i.e., Total in Bank Accounts): $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 5) Total Amount of all Debt (Mortgage, Credit Card, Other Combined) $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

6) List What You Consider to be Your “True Currencies”

7) Using a Scale from 1-10 (1 Being Not At All and 10 being Totally) how comfortable are you right now with your wealth?

1....2....3....4....5...6...7...8...9...10  
8) What areas of wealth building and money management most concern you?

9) What areas of wealth building and money management most interest you?

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**I-3 Other Financial Commitments and Considerations** (15 minutes)

Please list any upcoming or financial commitments or considerations that are anticipated or expected within the next 3-5 years (such as college costs; elder care; inheritance; sale of business; sale of other investments etc.) This is simply a “big picture snapshot” for now. We will make a more detailed document and formulation at a meeting together in the near future.

LIST ANTICIPATED **EXPENSES:** APPROX $

LIST ANTICIPATED **INCOME** APPROX $

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**I-4 Notes**

Please use this space for any additional thoughts, questions, or considerations.